

GO ANYWHERE[®]
Managed File Transfer

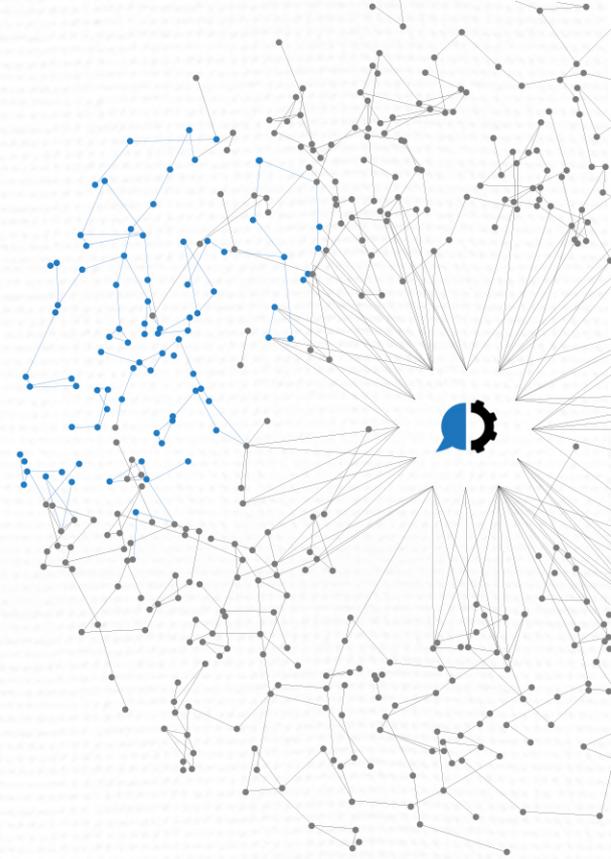
10 Ways to Improve Your Processes with GoAnywhere Advanced Workflows

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Today's Agenda

1. Introduction
2. 10 Ways to Use Advanced Workflows
3. Live Demo
4. Question & Answer



UP NEXT

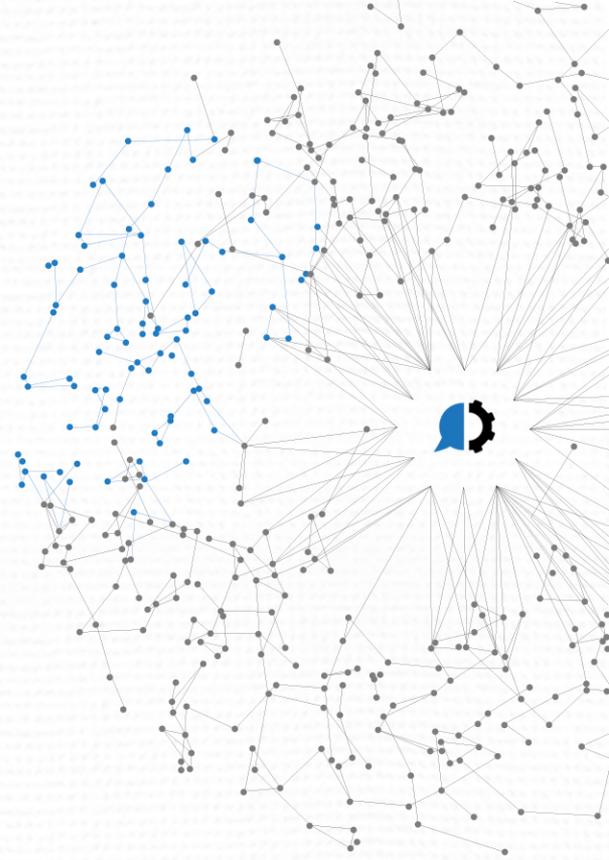
Today's Presenter



Dan Freeman, CISSP
Senior Solutions Consultant
HelpSystems



10 Ways to Use Advanced Workflows

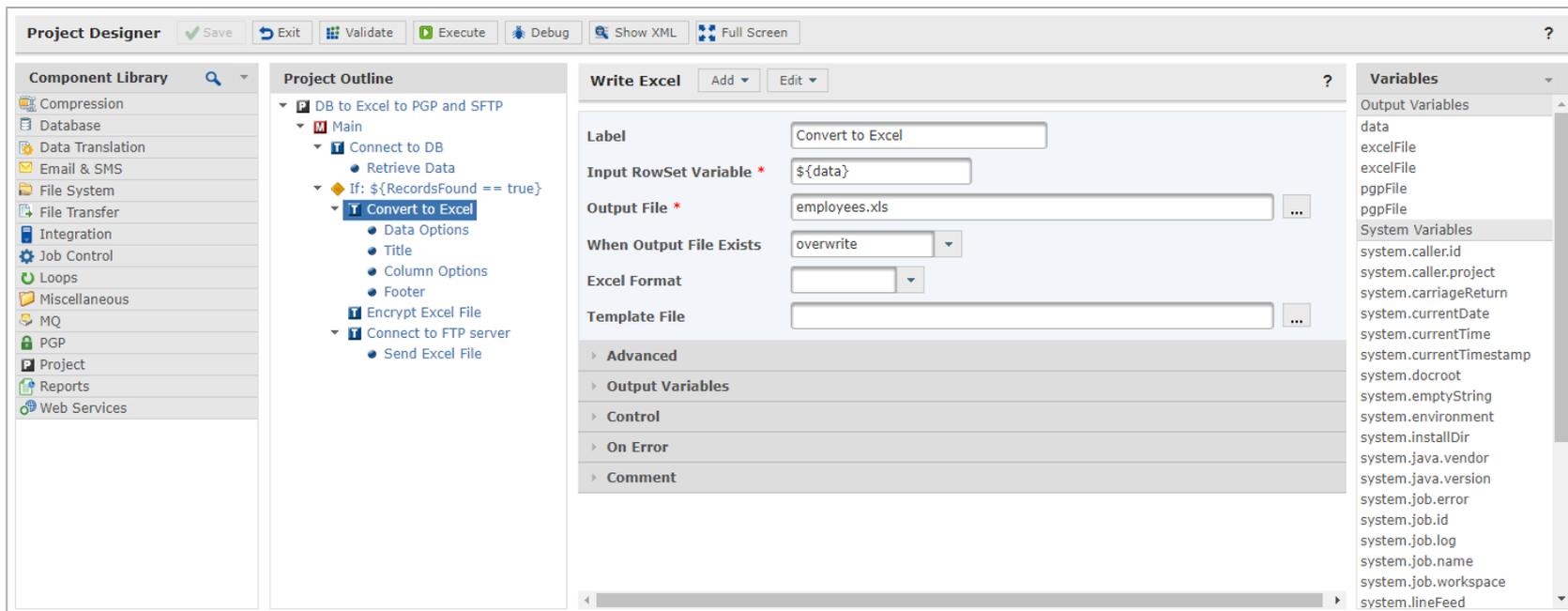


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Use #1: Create Projects with No Programming Skills

- ▶ Advanced Workflows are also known as Projects.
- ▶ These are simple to create and don't require programming skills.



The screenshot displays the 'Project Designer' application window. The interface is divided into several panes:

- Component Library:** A list of components including Compression, Database, Data Translation, Email & SMS, File System, File Transfer, Integration, Job Control, Loops, Miscellaneous, MQ, PGP, Project, Reports, and Web Services.
- Project Outline:** A tree view showing the project structure: DB to Excel to PGP and SFTP > Main > Connect to DB > Retrieve Data > If: \${RecordsFound == true} > Convert to Excel.
- Write Excel Configuration:** The main configuration area for the 'Write Excel' component. It includes:
 - Label:** Convert to Excel
 - Input RowSet Variable *:** \${data}
 - Output File *:** employees.xls
 - When Output File Exists:** overwrite
 - Excel Format:** (dropdown menu)
 - Template File:** (text field)
 - Advanced, Output Variables, Control, On Error, Comment:** Collapsible sections for further configuration.
- Variables:** A list of system variables such as system.caller.id, system.currentDate, system.currentTime, etc.

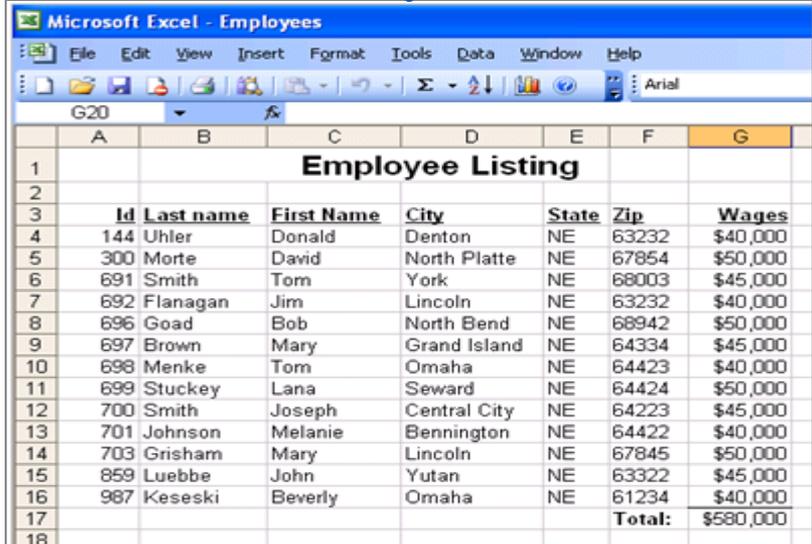
Use #2: Configure Advanced Workflows Resources

- ▶ You can use save time by configuring resources to:
 - ▶ Network locations
 - ▶ Email servers
 - ▶ File transfer servers
- ▶ This only needs to be done once, and then they can be used in other projects.



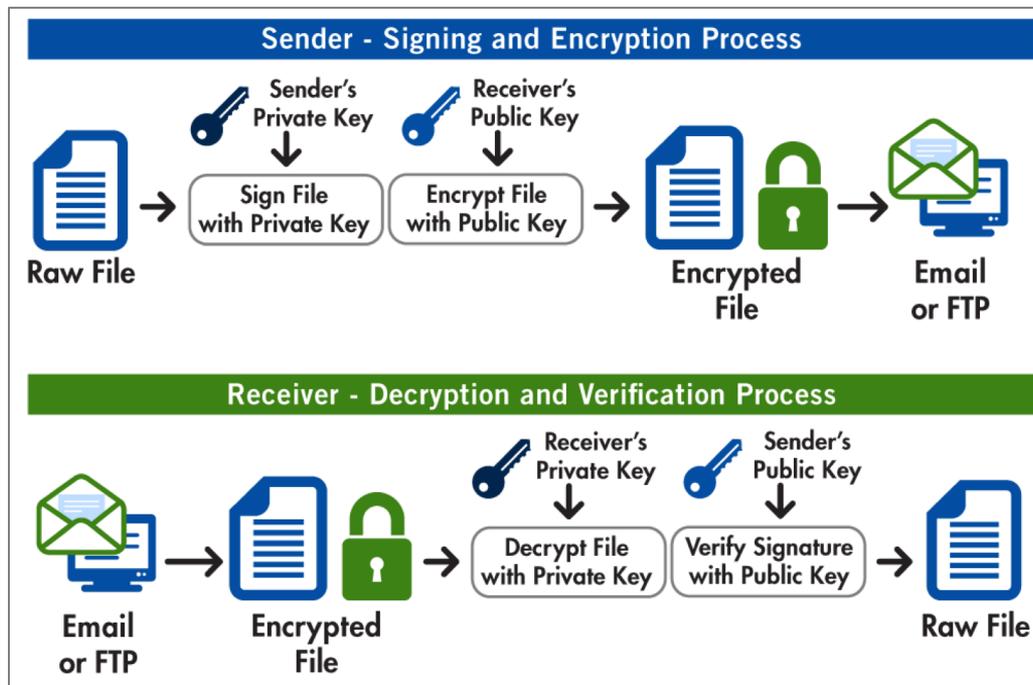
Use #3: Translate Data into Different Formats

- ▶ GoAnywhere Advanced Workflows comes with 15 tasks for data translation.
- ▶ These functions allow you to read/write files in multiple different formats.
- ▶ These tasks include:
 - ▶ Read/Write CSV, Excel, Fixed-Width-XML, JSON
 - ▶ Read Flat File
 - ▶ SQL query output to the various formats
 - ▶ Modify RowSet



| | A | B | C | D | E | F | G | |
|----|-----|------------------|-------------------------|--------------------------|--------------------|---------------------|-------------------|---------------------|
| 1 | | | Employee Listing | | | | | |
| 2 | | | | | | | | |
| 3 | | <u>Id</u> | <u>Last name</u> | <u>First Name</u> | <u>City</u> | <u>State</u> | <u>Zip</u> | <u>Wages</u> |
| 4 | 144 | Uhler | Donald | Denton | NE | 63232 | \$40,000 | |
| 5 | 300 | Morte | David | North Platte | NE | 67854 | \$50,000 | |
| 6 | 691 | Smith | Tom | York | NE | 68003 | \$45,000 | |
| 7 | 692 | Flanagan | Jim | Lincoln | NE | 63232 | \$40,000 | |
| 8 | 696 | Goad | Bob | North Bend | NE | 68942 | \$50,000 | |
| 9 | 697 | Brown | Mary | Grand Island | NE | 64334 | \$45,000 | |
| 10 | 698 | Menke | Tom | Omaha | NE | 64423 | \$40,000 | |
| 11 | 699 | Stuckey | Lana | Seward | NE | 64424 | \$50,000 | |
| 12 | 700 | Smith | Joseph | Central City | NE | 64223 | \$45,000 | |
| 13 | 701 | Johnson | Melanie | Bennington | NE | 64422 | \$40,000 | |
| 14 | 703 | Grisham | Mary | Lincoln | NE | 67845 | \$50,000 | |
| 15 | 859 | Luebbe | John | Yutan | NE | 63322 | \$45,000 | |
| 16 | 987 | Keseski | Beverly | Omaha | NE | 61234 | \$40,000 | |
| 17 | | | | | | Total: | \$580,000 | |
| 18 | | | | | | | | |

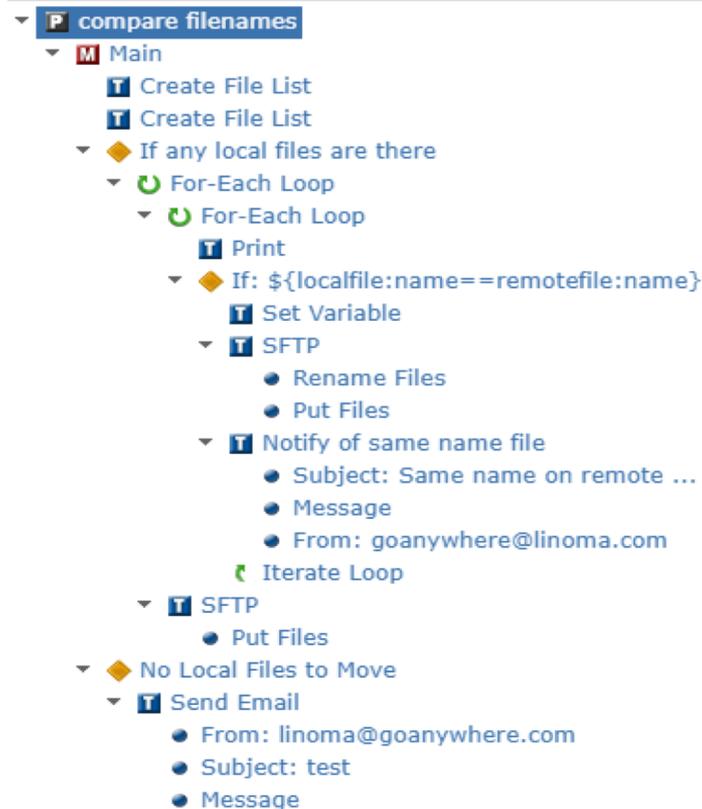
Use #4: Automate File Encryption/Decryption



- ▶ Advanced Workflows lets you automate the encryption and decryption process.
- ▶ You can encrypt and decrypt:
 - ▶ Documents
 - ▶ Digital Signatures/Verification
- ▶ Encryption is done with the OpenPGP standard.

Use #5: Create and Use Conditional Statements

- ▶ You can chain Advanced Workflow tasks together.
- ▶ These tasks will perform if the workflow runs and prior conditions are “true.”
- ▶ Conditional statements are made of “if/else” logic and loops.
- ▶ They will parse through variables or lists of files.



Use #6: Reference Projects as a Common Function

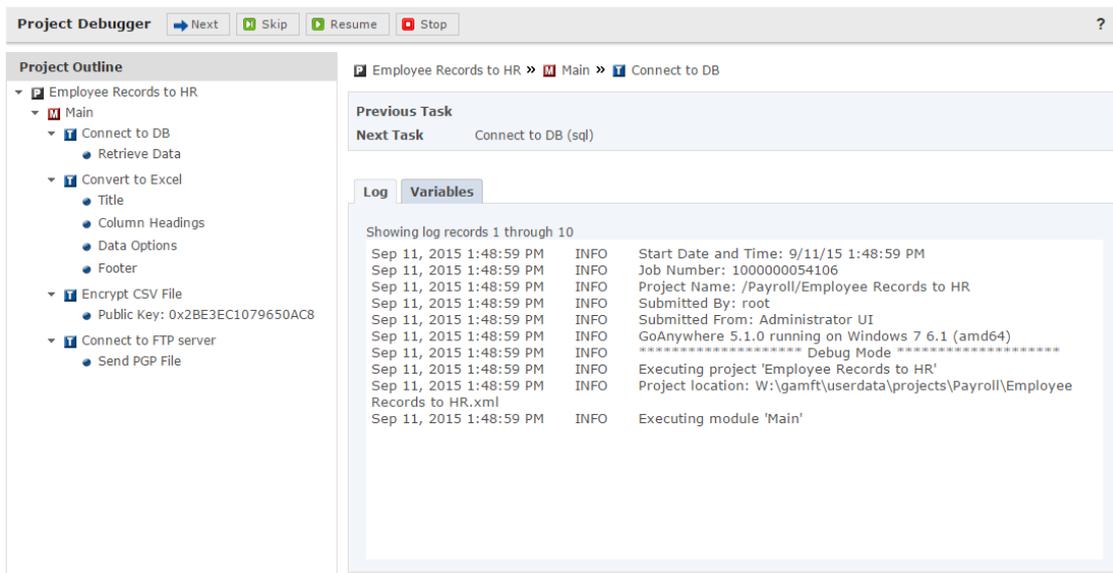
- ▶ Projects that you create can be called or referenced by multiple projects.
- ▶ They can be used by multiple projects as a common function or utility.

Project Outline

- ▼ **P** Common Error Project
 - ▼ **V** fromEmailAddr
 - ▼ **V** toEmailAddr
 - ▼ **V** emailSubject
 - ▼ **V** emailMessage
- ▼ **M** Main
 - ▼ **T** SQL
 - Query
 - ▼ **T** Send Email
 - From: \${fromEmailAddr}
 - Subject: \${emailSubject}
 - Message

Use #7: Run Workflows in Debug Mode

- ▶ You can run Advanced Workflows in Debug mode.
- ▶ This allows for easy troubleshooting of individual projects.
- ▶ For example: Interactively execute tasks one at a time to find a problem area.
- ▶ A job log and variable values are monitored during each step of the debug process.



The screenshot displays the Project Debugger interface. At the top, there are control buttons: Next, Skip, Resume, and Stop. Below this is the Project Outline pane, which shows a hierarchical view of the workflow steps. The current task being debugged is 'Connect to DB', which is highlighted in red. The log window on the right shows the execution details for the 'Connect to DB (sql)' task, including the start time, job number, project name, and the specific module being executed.

Project Debugger [Next] [Skip] [Resume] [Stop] ?

Project Outline

- Employee Records to HR
 - Main
 - Connect to DB
 - Retrieve Data
 - Convert to Excel
 - Title
 - Column Headings
 - Data Options
 - Footer
 - Encrypt CSV File
 - Public Key: 0x2BE3EC1079650AC8
 - Connect to FTP server
 - Send PGP File

Previous Task

Next Task Connect to DB (sql)

Log **Variables**

Showing log records 1 through 10

| | | |
|-------------------------|------|---|
| Sep 11, 2015 1:48:59 PM | INFO | Start Date and Time: 9/11/15 1:48:59 PM |
| Sep 11, 2015 1:48:59 PM | INFO | Job Number: 1000000054106 |
| Sep 11, 2015 1:48:59 PM | INFO | Project Name: /Payroll/Employee Records to HR |
| Sep 11, 2015 1:48:59 PM | INFO | Submitted By: root |
| Sep 11, 2015 1:48:59 PM | INFO | Submitted From: Administrator UI |
| Sep 11, 2015 1:48:59 PM | INFO | GoAnywhere 5.1.0 running on Windows 7 6.1 (amd64) |
| Sep 11, 2015 1:48:59 PM | INFO | ***** Debug Mode ***** |
| Sep 11, 2015 1:48:59 PM | INFO | Executing project 'Employee Records to HR' |
| Sep 11, 2015 1:48:59 PM | INFO | Project location: W:\gamft\userdata\projects\Payroll\Employee Records to HR.xml |
| Sep 11, 2015 1:48:59 PM | INFO | Executing module 'Main' |

Use #8: Schedule and Automate GoAnywhere Reports

- ▶ Advanced Workflows can be used to schedule and automate reports.
- ▶ This includes:
 - ▶ Generating reports
 - ▶ Delivering reports
 - ▶ Sending email/text notifications
- ▶ GoAnywhere's built-in scheduler can be used to call projects.



| Project | Schedule | Email Notification | Project Variables |
|-------------------------|----------|--|-------------------|
| Current Server Time | | 6/12/15 4:25:21 PM | |
| Schedule Frequency * | | Weekly | |
| Schedule Options | | | |
| Start Date * | | Jun 12, 2015 | |
| Start Time * | | 12:00 | |
| Run Every * | | 1 Weeks | |
| Days to Run * | | <input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat | |
| End Date | | | |
| Holiday Options | | | |
| Holiday Calendar | | Holiday Calendar | |
| Holiday Rule * | | Skip | |
| Repeat Options | | | |
| Frequency | | Never | |

Use #9: Control Data Security with Triggers

- ▶ You can control the security of your data with triggers.
- ▶ Triggers can be defined to monitor for certain events, e.g.:
 - ▶ Account Disabled
 - ▶ Download failed
 - ▶ Login Successful
- ▶ A triggered event can kick off a response like:
 - ▶ Receiving an email when a file is uploaded by a trading partner.
 - ▶ Automatically removing a partial file from a folder if the file upload is unsuccessful.
- ▶ Triggers can automate projects, send notifications based on user actions in GoAnywhere, and more.

Use #10: Monitor Files for Determined Events

Add Monitor Save Cancel

General | **Schedule** | **Project** | **Advanced** | **Email Notifications**

Monitor Name *

Domain

Description
145 Characters Remaining

Status Active Inactive

Monitor Location *

Folder * ...

Recursive

Event Type

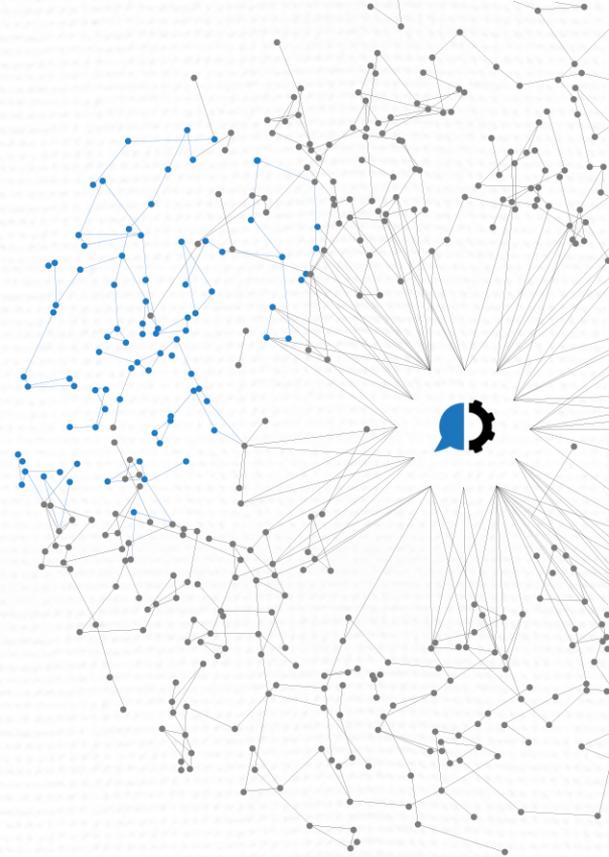
File Name Pattern *

Pattern Type

- ▶ Advanced Workflows can do file-based monitoring for certain events.
- ▶ Examples include monitoring for files that are:
 - ▶ Created or Modified
 - ▶ Created
 - ▶ Modified
 - ▶ Deleted
 - ▶ Exists



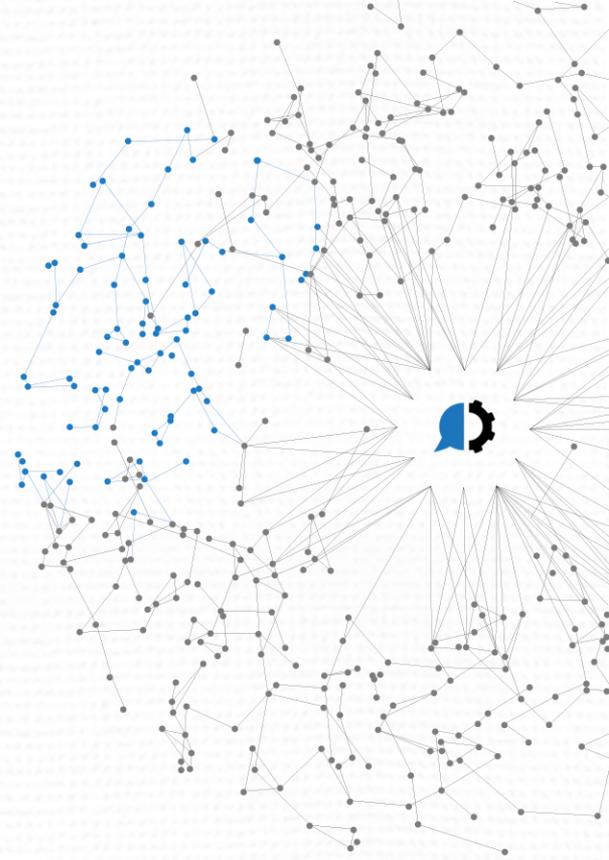
Live Demo



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Question & Answer



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Thank you for joining us!



New to GoAnywhere? Download our free 30-day trial at www.goanywhere.com/trial and try out Advanced Workflows for yourself!

Already using GoAnywhere? If you'd like to add the Advanced Workflows module, contact us at:

- ▶ goanywhere.sales@helpsystems.com
- ▶ Toll-free 1-800-949-4696
- ▶ Direct (402) 944-4242